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ABSTRACT

This final report describes the activities and accomplishments of the Consortium on Inclusive Schooling Practices, a federally-funded 5-year project to investigate the utility of a systemic approach for building the capacity of state and local education agencies to provide inclusive educational services. The project focused on four states (Pennsylvania, Missouri, New Mexico, California) as partners for the Consortium's intensive, state-local technical assistance and policy efforts. Introductory material presents elements of the Consortium's approach and a summary of its objectives and activities. Following sections of the report discuss factors affecting implementation of the Consortium's work scope; procedures; state and local interventions and technical assistance; coordination among statewide systems change grants; products developed and disseminated; collaboration and dissemination activities; and project impact. Among 7 recommendations are the following: (1) the Office of Special Education Programs (OSEP) should continue to fund 5-year, technical assistance projects; (2) OSEP should focus such funding on issues related to systems change and the links between policy and practice; and (3) OSEP should increase attention to the educational needs of students with significant disabilities. (Contains 20 references.) (DB)

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Consortium on Inclusive Schooling Practices

FINAL REPORT

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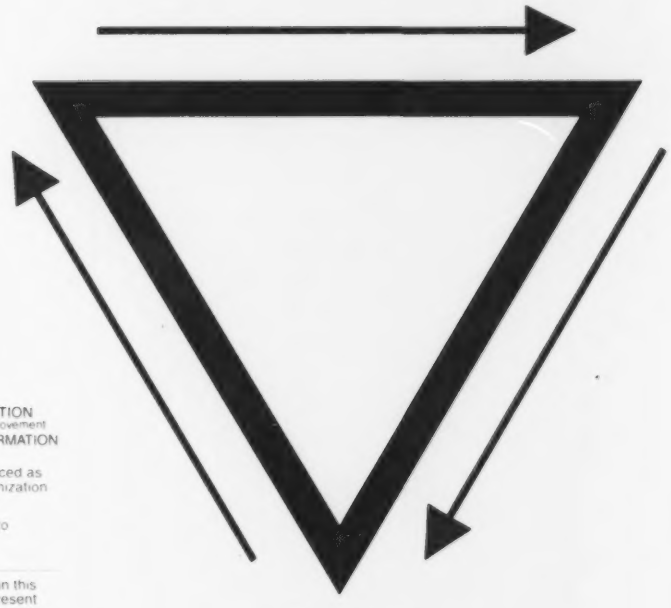

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INTRODUCTION

In 1994, the Consortium on Inclusive Schooling Practices (Consortium, CISP) received funding from the U.S. Department of Education, Office of Special Education Programs (OSEP), to investigate the utility of a systemic approach for building the capacity of state and local education agencies to provide inclusive educational services. The Consortium focused its efforts intensively in selected states and districts. Although we could have provided less intensive services to a greater number of states and districts, we felt that in order to understand the complex interdependencies between policies and practice, and actually contribute to durable change, it was important to work intensively in fewer sites. Four states (Pennsylvania, Missouri, New Mexico, California), selected for their cultural, geographic, and contextual differences, were selected as partners for the Consortium's intensive, state-local technical assistance and policy work.

Our work was specifically directed at policymakers, as well as practitioners, as a method to support large-scale, sustainable change. Research indicates that inclusive schooling *practices* at the school or classroom level can significantly alter the school experience and outcomes for students with disabilities. Similarly, inclusive *policies* can pave the way for larger numbers of student with disabilities to be included in neighborhood schools and general education classrooms. Without inclusively written policies, states and districts can inadvertently limit efforts at the local level to promote change, initiate reforms, and improve educational practice. Inclusive policy establishes

expectations for how the entire education system needs to operate and how components of the system should relate to one another.

The initial partners of the Consortium were: the Allegheny-Singer Research Institute (Salisbury), the University of Montana (McGregor), San Diego State University (Pumpian and Fisher), SUNY-Binghamton (Rainforth), and the National Association of State Boards of Education (NASBE)(Roach). As the project developed over the first year, it became increasingly clear that the skills of the principal partner from SUNY-Binghamton were not matched to the needs of the project, nor was she able to devote the time needed to the project for the intensive state/local technical assistance plans that were devised. Hence, the partnership was redefined with the remaining four partners after that year.

Elements of the Consortium's Approach

There were five defining elements to the Consortium's approach to supporting inclusion. These include:

(1) **Develop inclusive philosophy, policies, structures and practices.** The Consortium defined inclusion not just as a place or method of delivering instruction, but as a philosophy that undergirds the entire educational system. Inclusion was supported as part of the culture of a school, defining how students, teachers, administrators, parents and others viewed the potential of children.

(2) **Build capacity.** The Consortium believed that for large-scale change to occur, capacity must be developed within and across organizations. Capacity building involves developing the knowledge and skills of those at

all levels and in all areas of the organization, creating supporting structures and policies, providing resources, and establishing mechanisms to continually evaluate progress.

(3) **Approach change systematically**. The Consortium focused on the interdependence among the various systems and parts of systems that provide services and supports to children and youth with and without disabilities. We reasoned that promoting coherence among structures, policies, practice and research would produce the most durable and widespread changes.

(4) **Link change to policy.** Prior inclusion efforts have often not been sustained because they were focused on changing the specific placement or services of one student, or group of students, rather than changing the policies that design the type of system that a student enters. The Consortium's approach was grounded in the belief that improvement in the services, supports, and outcomes for students with disabilities is dependent on altering the policies that drive both general and special education. Change must be explicitly linked to policy, and policies must be inclusive in their intent and implementation.

(5) **Use general education as the context.** The Consortium believed that inclusive learning communities should not be considered solely a special education agenda. General education structures, practices, and curriculum should serve as the context within which individualized services and supports are delivered to all children, including those with disabilities.

These five elements were infused into all of the major activities of the Consortium and helped to define our scope of work.

Objectives and Activities

The Consortium, a technical assistance and capacity building institute, had three broad objectives: (1) to establish a change process in multiple states focused on systemic reform; (2) to translate research and policy information into implementable educational practices; and (3) to build the capacity of state and local agencies to provide inclusive educational services.

Throughout the six years of the Consortium's work, those three objectives were implemented through ten goals enumerated in the Cooperative Agreement:

(1) Present a synthesis of the relevant extant inclusion theory and research to serve as a conceptual basis for institute activities;

(2) Translate the knowledge base into inclusive educational practices and materials for use by program implementers and policymakers at the state, district, building, and classroom levels;

(3) Provide training and technical assistance for the adoption, use, and maintenance of inclusive educational practices to interested projects funded under Statewide Systems Change and to other educational agencies interested in systems change activities;

(4) Evaluate the effectiveness of the institute's activities in assisting with the implementation of inclusive educational practices;

(5) Produce a variety of evaluation data;

(6) Provide training and technical assistance on inclusive educational practices to other OSEP-sponsored technical assistance entities and clearinghouses;

(7) Establish linkages and collaborative relationships among OSEP-sponsored research projects;

(8) Provide training and experience in translating research to practice, materials development, technical assistance, dissemination, and program evaluation for five graduate students annually;

(9) Conduct topical meetings and other activities on strategies and emerging practices in inclusive education; and

(10) Collect and ensure timely dissemination to policymakers and program implementers of information on inclusion, systems change, school reform and restructuring initiatives.

The goals were addressed through a variety of activities, including: developing a synthesis of the research literature that informs best practices about inclusive schooling; translating the knowledge base about inclusion into recommended practice at the state, district, and school level through technical assistance; and providing workshops and seminars on topics related to inclusion. The Consortium developed and disseminated to a variety of stakeholders a series of issue briefs on topics related to inclusion and documented and evaluated our work through state-local case studies. In addition, we supported regional training efforts in states, provided technical assistance to state policymakers, and developed products and articles that

drew upon cross-case analysis of our work for broad dissemination.

Relationship of Activities/ Products to 10 Cooperative Agreement Areas

Activities, Tools & *Products*	(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)
Three state-local case studies *Promoting Implementation of IDEA Using an Iterative Feedback Loop Process* *Applications of a Policy Framework to Evaluate and Promote Large Scale Change*		X	X	X	X		X	X	X
Portfolio rubric *Pathways to Inclusive Practices* Issue Briefs		X	X	X	X		X	X	X
Issue Briefs *Determining Policy Support for Inclusive Schools*	X	X		X	X		X		
Research Synthesis	X	X							
State/district technical assistance utilizing the feedback loop model		X	X	X	X			X	
Training and technical assistance provided to national, regional and statewide groups and development and maintenance of the SWSCNET listserv	X	X	X			X	X	X	X

10 Cooperative Agreement Areas
(1) Synthesize literature
(2) Translate knowledge base
(3) T/TA to systems change projects
(4) Evaluate effectiveness of CISP activities
(5) Produce a variety of evaluative data
(6) Provide T/TA to other TA projects
(7) Establish linkages and collaborations
(8) Provide support for graduate students
(9) Present at topical conferences
(10) collect and disseminate information

FACTORS AFFECTING IMPLEMENTATION OF THE CONSORTIUM'S WORK SCOPE

There were both supportive and impeding factors that affected the implementation of CISP's work scope over its five-year funding term. Procedurally, a number of project management procedures were put into place. First, the co-directors of CISP established a regular schedule of project conference calls in order to problem solve and develop coherence across the sites. Dr. Doug Fisher also pursued a year of post-doctoral study on education policy with NASBE which helped lend cohesiveness to the approach used with state and local policymakers. The process of putting together quarterly reports for OSEP and distributing those reports among the project staff also added focus to our work and an opportunity to ensure that all project staff were aware of the work of others in the Consortium. Having ready access to the state board of education in each state allowed the project to start its work with the very stakeholders whom we were trying to involve in the process of change. The visibility and relative standing of the state board among educators in the state lent credibility to our work that resulted in greater support at the local level. The cooperation that we received from our state and local partners in the project was substantial and resulted in changes in both their work and ours. Finally, the program officers in OSEP – Drs. Anne Smith and Ray Miner -- were very helpful in responding to documents and draft products, linking the Institute to other projects and new initiatives, and, in general, providing guidance to CISP.

Although CISP was funded from 1994-1999 a significant fiscal event at the prime site (Allegheny Singer Research Institute, ASRI) impeded our ability to fully

implement the work scope of this Institute for a period of approximately 18 months. The parent organization of ASRI, Allegheny Health Education and Research Foundation (AHERF), went into bankruptcy during the fourth year of our project. For approximately 8 months leading up to this event and for 12 months after the declaration of bankruptcy, the Consortium experienced significant fiscal issues that directly affected our ability to implement planned activities. For example, bills from hotels where we held national meetings with Statewide Systems Change projects in Washington went unpaid. Attempts to find other locations for scheduled national meetings and symposia hit roadblocks because ASRI could not pass a credit check. Funds for cross-site meetings were unavailable, rental car companies would not rent to us because the corporate credit card was over-drawn, and we had no assurances that out-of-pocket expenses would get reimbursed. Payments to subcontractors (San Diego State University; NASBE) also lapsed for a period of time. Understandably, a work slow down at these sites became necessary because resolution of the non-payments was very unclear for almost 9 months. There were also significant concerns on the part of OSEP/DOE that federal funds had been misappropriated by ASRI/AHERF to cover their debts. Considerable time, effort, and resources were expended by Dr. Anne Smith (project officer), Dr. Ray Miner (supervisor), OSEP legal, and OSEP accounting to assist us in resolving a mountain of fiscal issues. Fortunately, much of CISP's intensive state and local work had already concluded by the time the bankruptcy hit. The activities most affected were

those related to statewide systems change projects, cross-site analyses of the Consortium's findings, product development, and dissemination.

The Principal Investigator chose to leave ASRI and transferred the Consortium to Chicago (Erikson Institute). This transfer also took some time and considerable effort on the part of the OSEP Research to Practice team because the funds showing in the GAPS system did not match what the PI had as the available balance, and neither balances matched what ASRI/AHERF said it had spent. Ultimately resolved, the transfer occurred and we were able to resume our work in July, 1999. We were afforded an extension of time so that we could conclude the analyses, product development, and dissemination work in the Cooperative Agreement.

During the bankruptcy and transfer of the Consortium to Chicago the San Diego investigators needed to move on to other projects and funding. They, therefore, could not commit their energies to helping us finish the residual tasks for the Consortium. Consequently, completion of the Consortium's remaining analysis and product development activities was handled by the PI (Salisbury), two of the CISP Co-Directors (Roach and McGregor), and the Missouri site liaison (Strieker). Because of these setbacks and issues, the Consortium did not officially conclude its analyses, product development, and dissemination activities until June, 2001.

PROCEDURES

The Consortium undertook two primary spheres of activity: (1) state and local interventions and technical assistance in three states – California, New

Mexico, and Missouri; and (2) coordination among the federally-funded Statewide Systems Change (SWSC) grants. In both spheres of activity, the Consortium interacted with a variety of constituencies, undertook a variety of activities, and produced a variety of products.

State and Local Interventions and Technical Assistance

Initially, the Consortium began its partnership in four states – California, New Mexico, Missouri, and Pennsylvania. In each state the Consortium's work focused on state level policy activity as well as specific training and technical assistance to targeted districts for a period of two years per district. The targets of change were policies and practices at the district level, as well as statewide structures and policies. Despite focused efforts, we determined that we had to discontinue our work in Pennsylvania. This was due to a number of factors, including a change in administration, a complete reorganization and downsizing of the state department of education, and political disagreements between the secretary of education and the state board of education. To continue in the state, we determined, would require an extended period of non-involvement until these issues could be smoothed over. We felt that it was better to concentrate our efforts in the remaining three states where we had clear political will and momentum to proceed.

A portfolio protocol served to guide data collection efforts at the district level. A variety of policy analysis strategies were adopted to guide our work at the state level. These data were shared with our state partners over the four-

year period to inform their decisions and actions, and validate our interpretations of change.

State level procedures. At the state level we began our work by conducting a series of telephone interviews with State Board of Education members and staff from the state department of education. Data from these interviews was used to structure an initial study session and to develop an off-site policy audit of the salient education policies and issues in the state influencing inclusive education. These findings were presented to the state board of education in each state where the focus of the Consortium's policy activities were determined. The case studies document in detail our specific activities at the policy level in each target state.

Local level procedures. In each state, an RFP was released, in conjunction with the state department of education (SEA), to solicit proposals from districts interested in working with the Consortium. Based upon a review of district proposals and a site visit by Consortium staff at least three districts in each of the three states were selected by a team of Consortium and SEA staff. Upon selection, the Consortium met with a coordinating team in the district to select specific schools within a feeder path, conduct a needs assessment, develop a district-level action plan, and design a complementary building-level action plan. Each district was required to sign a memorandum of understanding stipulating the resources and support to be provided by both parties. All of our technical assistance was based on recommended practices and the research literature on inclusion. Much of this research literature was synthesized by the

Consortium and distributed nationally (McGregor & Vogelsberg, 1998). Local level technical assistance activities have been reflected in the case studies, as well as workshops, conference presentations, and manuscripts (e.g., Fisher, 1999; Salisbury & Strieker, in press; Keefe & Lieberman, 1998).

In addition to its state policy and district-level work the Consortium also helped develop other statewide infrastructures. For example, in New Mexico, the seven state universities offering teacher preparation programs agreed on a set of five core courses that all teachers seeking special education certification must take to qualify for a teaching license. In Missouri, higher education institutions began discussions about how to restructure their programs from separate divisions of special education and general education into one division of teaching and learning. Two university programs made this transition during the term of our involvement in the state. Based on the work of the Consortium and other inclusion projects in the state, policies regarding statewide data reporting forms in California were altered so that they could reflect students with significant disabilities receiving services in the general education classroom, as opposed to a special class.

Coordination Among Statewide Systems Change Grants. Beginning in 1987, the Office of Special Education Programs (OSEP) at the U.S. Department of Education funded a series of Statewide Systems Change Grants to state departments of education and universities. One of the main purposes of these grants was to support "projects that enhance the capacity of States to ...significantly increase the number of children with severe disabilities the State

serves in general education settings, alongside children of the same age without disabilities" (Smith, 1997; Smith & Hawkins, 1992). In all, 26 states received funds to undertake Statewide Systems Change projects. The projects were designed to encourage large-scale adoption of effective educational practices across state systems and to increase the movement of student with disabilities from segregated to integrated to inclusive school campuses.

Collectively, the statewide systems change projects represented a significant investment of federal funding and a potential wealth of information about policy implementation within states. The focus on these projects on statewide systems change represented a unique investment from OSEP in ways to promote the inclusion of students with disabilities, including those with significant needs, in general education contexts broadly within states. The Consortium was charged with the responsibility under its Cooperative Agreement of synthesizing the findings from their many years of work, and creating an effective network among these projects.

Table 1. States Receiving Statewide Systems Change Grants from the Office of Special Education Programs, U.S. Department of Education

California: 1987-92, 95-00	New York: 1990-95, 95-00
Colorado: 1987-92, 95-00	Pennsylvania: 1990-95
Illinois: 1987-92	South Dakota: 1990-95, 95-00
Kentucky: 1987-92, 92-97	Maryland: 1992-97
Virginia: 1987-92	Minnesota: 1992-97
Indiana: 1988-93	Kansas: 1992-97
New Hampshire: 1988-93, 93-98	Louisiana: 1993-98
Vermont: 1988-93, 93-98	Maine: 1993-98
Hawaii: 1989-94, 94-99 (Pacific rim)	Oklahoma: 1993-98
Michigan: 1989-94	Wisconsin: 1993-98
Utah: 1989-94	Georgia: 1994-99
Washington: 1989-94	Massachusetts: 1994-99
Arizona: 1990-95	Montana: 1995-00

To address this charge, the Consortium established linkages and collaborative relationships among the SWSC grants in three ways. First, the Consortium developed SWSCNET, a listserv that connected each of the Statewide Systems Change projects to each other electronically. The listserv participants included parents, policymakers, administrators, researchers and practitioners. There were over one hundred subscribers to the listserv during its period of greatest use. The purpose of SWSCNET was to link participants interested in large-scale reform and inclusion. The forum was used to discuss differences in policies among states, solve problems, share information, synchronize efforts, plan conferences, and update subscribers on legislative changes.

Second, the Consortium convened three meetings of the SWSC projects to foster and build the network of the professionals who had longitudinal

experience in working to promote inclusive practices for students with significant disabilities. The initial meeting was designed to provide a forum for exchange between and among the SWSC projects, Consortium, and OSEP. The second meeting provided a forum for further exchange and an opportunity to begin to chronicle the collective achievements of the SWSC projects at the state, district, and building level. The third meeting was facilitated by the Great Lakes Area Regional Resource Center (GLARRC). A process of structured dialogue and systematic analysis of respondent findings was used to systematically identify strategies that SWSC projects had found most useful in promoting inclusive practices and the evidences they had to support their work.

Third, the Consortium worked with the SWSC projects to distill strategies and recommendations for promoting inclusive education for students with disabilities, particularly for those with significant disabilities. A summary of the findings of this work was developed by GLARRC. This product, *Statewide Systems Change Lessons Learned Meeting,* was distributed along with the raw data from each of the work groups to all the participants of the meetings, OSEP, and to those members of SWSCNET who requested it. Interestingly, the key strategies identified by the SWSC projects independently clustered into five of the six areas represented by the Consortium's policy framework.

In addition, findings about statewide change and the promotion of inclusive schooling practices were infused into and disseminated through a variety of products developed by the Consortium. In addition to the product, *Statewide Systems Change Lessons Learned*, a resource compendium of

products produced through all OSEP-funded, severe disabilities projects, was developed by one of the graduate students supported by the Consortium. Finally, findings from the SWSC projects were also integrated into *Pathways to Inclusive Practices: Systems-oriented, Policy-linked, and Research Based Strategies that Work*[1] (Salisbury, Strieker, Roach, & McGregor, 2001). This product is available through NASBE's website (www.nasbe.org), as well as that of the National Institute on Urban School Improvement (www.edc.org/urban).

Products Developed and Disseminated

Several products were developed based upon our state and local level work. These products were disseminated through print and electronic media and are listed below:

- Issue briefs: A series of eight issue briefs were written on topics related to inclusive practices. These issue briefs reflected elements of the policy-linked framework developed by the Consortium to analyze state and local policy and their effects on school inclusion. The issue briefs were designed to be accessible to a range of audiences, to extend the discussion of the framework, and illustrate applications for state and local levels. Each issue brief was mailed to over 4,000 individuals and groups, and posted on the Consortium's website as a downloadable pdf file. Currently, many of these documents are available on the NASBE website (www.nasbe.org). The issue briefs are as follows:

  A Framework for Evaluating State and Local Policies for Inclusion, (Consortium for Inclusive Schooling Practices, 1996);

[1] The following products have been submitted with this final project report:

Assistive Technology & Inclusion, (Sax, Pumpian, Fisher, 1997);

Related Services Supporting Inclusion: Congruence of Best Practices in Special Education and School Reform, (Rainforth, 1996);

Curriculum and Its Impact on Inclusion and the Achievement of Students with Disabilities, (Jorgensen, with Fisher & Roach, 1997);

Providing Accurate Placement Data on Students with Disabilities in General Education Settings, (Roach, Halvorsen, Zeph, Guigno, & Caruso, 1997);

Statewide Assessment Systems: Who's In and Who's Out?, (Fisher, Roach, and Kearns, 1998);

Including Students with Disabilities in Accountability Systems, (Roach & Bhaerman, 1998);

Professional Development for All *Personnel in Inclusive Schools*, (McGregor, Halvorsen, Fisher, Pumpian, Bhaerman, & Salisbury, 1998);

- Case studies: Case studies were developed to describe findings about the intersection of systemic reform and inclusive schooling practices at both the state and local district level within each of the three target states (MO, NM, CA). The case studies provide an integrated evidence base of the contributions toward change and the resulting shifts in policy and practices that occurred in each of the states. Case studies were distributed within states following review and approval by both state and district personnel.
- Portfolio rubric: This rubric was developed to guide the collection of change data and evidence at the district, building and student-level. It provided a structure for collecting information about the work of the Consortium that could be shared with the district- and building-level staff, and the foundation for comprehensive district level portfolio documents.

- Framework article: *"Applications of a Policy Framework to Evaluate and Promote Large Scale Change,"* (Roach, Salisbury, & McGregor, in press). This article describes the six components of the policy framework used by the Consortium and the various ways in which it was applied across states and districts.
- Integration of findings from SWSC and the work of CISP: *Pathways to Inclusive Practices: Systems Oriented, Policy-linked, and Research Based Strategies That Work*, (Salisbury, Strieker, Roach, & McGregor, 2001). This guidebook was developed for a variety of stakeholders and provides, in lay terms, an integration of CISP and SWSC strategies / findings for promoting large-scale change and inclusive practices. This product was distributed to over 300 individuals and groups and is available as a downloadable pdf file on the NASBE (www.nasbe.org) and the National Institute on Urban School Improvement (www.edc.org/urban/products).
- Policy-linked assessment tool: *Determining Policy Support for Inclusive Schools*, (Strieker, Salisbury, & Roach, 2001). There are six sections in this document. Each section includes a brief summary of the research in the policy area, indicators for assessing the extent to which evidence of inclusive policy and practice exists in the area, and a rating scale for each indicator. This product was distributed to over 300 individuals and groups and is available as a downloadable pdf. file on the NASBE and Urban Institute websites.

- Feedback loop article: *"Promoting Implementation of IDEA Using an Iterative Feedback Loop Process,"* (Roach, Salisbury, & Fisher, under editorial review). This article describes a feedback loop process created to enhance communication about policy development and implementation among constituents at different levels of the state and local education system.

In addition to the products noted above, the Consortium was a contributor to the development of three additional documents that were published through different entities:

Determining What to Teach and How to Teach It: Connecting Students Through Curriculum and Instruction. Published by the Peak Parent Center, Denver, CO.

Keys to the School House Door: Educating all Children. Published by the Missouri Department of Elementary and Secondary Education.

Education & Treatment of Children (Vol. 20, no. 1). Consortium staff and the project officer contributed all of the articles in this special edition on inclusive educational practices. Gail McGregor served as guest editor of this issue of the journal.

Collaboration and Dissemination Activities

In addition to the SWSC and state/local work, CISP was required by its Cooperative Agreement to coordinate its activities with other funded projects and to disseminate its findings broadly (Cooperative agreement goals (1), (2), (3), (6), (9), and (10)). Major dissemination vehicles and collaborative partnerships are described below.

Research Synthesis. Consortium Co-Director Gail McGregor, with Tim Vogelsberg, wrote *Inclusive Schooling Practices: Pedagogical and Research*

Foundations, A Synthesis of the Literature that Informs Best Practices about Inclusive Schooling. This research synthesis paralleled the practice-based synthesis of findings that was produced with contributions from the SWSC projects (see above). The purpose of the synthesis was to summarize the literature base that informed the current understanding of the best approaches to support students with disabilities in inclusive settings.

Symposia. The Consortium sponsored three symposia as part of its work. The first, entitled **Symposium on School Reform and Inclusion**, was a meeting of the project directors of the then OSEP Severe Disabilities Branch, with invited participants from the OSEP research grants and representatives from other federally-funded institutes (e.g., National Institute on Disability Rehabilitation and Research (NIDRR); Division of Innovation and Development). The purpose of this symposium was to establish a structured dialogue that would allow in-depth examination of critical implementation issues among individuals engaged in school and community reform efforts. Questions of how the interests of students with severe disabilities can and will be incorporated into broader school reform agendas were the focal point of this working meeting. Over 100 participants attended this meeting. Information from this symposium was used to inform the work of the Consortium nationally, and frame recommendations for priorities at the federal level.

The second symposium, entitled the **Safe and Effective Schools Symposium**, was co-sponsored by the Consortium, OSEP, the Positive Behavior Support Project, and the Center for Effective Collaboration and Practice

at AIR. This meeting was attended by 56 professionals from the fields of mental health, medicine, rehabilitation, public health, higher education, government, public education, and parent advocacy. The symposium was facilitated by GLARRC and used a process of structured dialogue to distill "what works" and recommendations for research, policy, and practice that promote safe and effective schools for all students. Findings were summarized and distributed through the sponsoring groups via electronic and print formats.

The final national symposium, **Colorado 1998 Conference on Inclusive Education,** was co-sponsored with the PEAK Parent Center, Denver, CO, and the Colorado Statewide Systems Change project. As in other years, the focus of the conference was on including students with significant disabilities in general education reform. All Consortium key personnel presented workshops at the conference that was keynoted by Norman Kunc. More than 1200 educators, parents, and professionals attended this conference.

OSEP briefing. Consistent with its policy-linked approach, the Consortium staff organized an administrative briefing with federal policy makers at OSEP. The purpose of this briefing was to share preliminary findings from the work of the Consortium and to discuss issues related to the support of IDEA and inclusion for students with disabilities from the state policy perspective. Topics at this administrative briefing included: funding, student placement data, accountability and monitoring.

ASCD Conference Strand. In an effort to infuse findings into a policy and general education context, the Consortium took the lead in developing a

conference strand for the annual Association for Supervision, Curriculum and Development (ASCD) convention. This strand was designed to offer grounded strategies on how to promote inclusive practices for an audience of educators and local district administrators. The Consortium coordinated the elements of the strand, the submission of proposals, and fiscal support for some of the presenters. The presentations were as follows:

- Meyer, L.H. "*Restructured Staffing for Quality Inclusive Schooling.*"
- Fisher, D. "*A Place at the Prom: Implementing Inclusive Education Through Curriculum Reform.*"
- McGregor, G.M. "*Disability and Diversity: Using the Children's Literature to Explore Individual Differences.*"
- Rainforth, B. "*Collaboration in the Inclusive Classroom: Making Change Happen.*"
- Ferguson, D. "*Individually Tailored Learning: Designing Learning for ALL Students.*"
- Dalmau, M. "*Lifelong Learning: Teacher Education and Schools of the Future.*
- Ferguson, D. "*Tools of School Self-reflection for Change and Renewal – Holding up A Mirror.*"
- Fox, W. "*Restructuring Schools to Include All Children.*"
- Salisbury, C. "*Educators and Students Working Together to Include Young Children with Disabilities in Elementary Classrooms.*"

Web-based Resources. In addition to the printed version of the Consortium materials, all Consortium products were also available electronically at the Consortium's own web page as well as through links on other web pages. The original Consortium homepage, housed on the Allegheny-Singer Research Institute website is no longer in existence. However, a brief description of the Consortium and several of its products may be found on the website of the OSEP-funded National Institute for Urban School Improvement (http://www.edc.org/urban). These same documents, as well as the Issue Briefs, may also be found at the website of the National Association of State Boards of Education (www.nasbe.org).

Congressional briefing paper. In response to a request from OSEP's Division of Innovation and Development, the Consortium wrote a brief summary of "current understandings" related to the conditions, supports, and outcomes of integrated and inclusive schooling practices. This paper was used by the U.S. Department of Education in their work with Congress around inclusive education and appeared in the 1999 Report to Congress.

Manuscripts, workshops, and conference presentations. The Consortium staff also authored a number of articles; presented at conferences; and conducted workshops at the district, state, regional and national levels. These were documented in the quarterly reports of the Consortium, previously submitted to OSEP. Many of these articles and presentations were written and facilitated by the graduate students supported by the Consortium.

IMPACT

The Consortium impacted the field by generating new knowledge, translating new and existing knowledge for the field, and influencing policy and structural change in state and local educational systems in three states and 11 school districts. The Consortium ***generated new knowledge*** for the field through substantive contributions to the policy, research, and practice literature bases. These contributions include distilling the current body of research supporting inclusive education through the research synthesis (McGregor & Vogelsberg, 1998); developing strategies and recommendations for the field on large scale change (Salisbury, Strieker, Roach & McGregor, 2001; Roach, Salisbury & McGregor, in press; Roach, Salisbury & Fisher, under editorial review); and developing a policy framework with guiding questions and indicators that could be used to assess the extent to which state and local systems were inclusive (Consortium for Inclusive Schooling Practices, 1996; Strieker, Salisbury & Roach, 2001).

The Consortium ***translated the new knowledge it generated, along with existing research, broadly for the field using a variety of accessible formats***. As was noted above, the Consortium disseminated its products in both print and electronic versions, as well as in person. Specific activities included:

- The dissemination of publications to a broad mailing list of over 1600 recipients, including state and local board members, faculty in higher education, local district personnel, families and advocates;

- Three national symposia on: 1) school reform and inclusion, 2) safe and effective schools, and 3) inclusive education;
- Conference presentations and workshops to such audiences as the U.S. Department of Education, Office of Special Education Programs, the Association for Curriculum and Development, the National School Boards Association, Missouri Special Education Administrators conference, CAL TASH, SUN-TASH, national TASH, and higher education institutions;
- Articles and book chapters, authored by Consortium staff and appearing in such books and publications as *Exceptional Children, Journal of the Association for Persons with Severe Handicaps, the Reading Teacher, Education and Treatment of Children; Restructuring High Schools for All Children;* and *Including Students with Significant Disabilities: Putting Research into Practice.*
- Numerous hits to the Consortium's website, requests for information of the co-directors (approximately 5-10 requests per week) and activity on the SWSCNET (approximately 35 messages per month).

The Consortium ***influenced policy changes in three states***. The work of the Consortium was to make contributions toward change, to change by example, and to promote the development of policies, practices, and structures to support inclusive schooling practices at multiple levels of the system throughout the states. In some of the states that the Consortium worked in, there were specific policy changes, while in other states seeds of new paradigms were

planted and nurtured in the four years of technical assistance provided by the Consortium.

In California, the Consortium influenced a State Board directive, encouraging districts to include students with disabilities in their assessments. Hence, many local districts began including more students with disabilities in their assessments fully two years before the federal mandate to do so. The Consortium also worked with the legislative staff, a coalition of districts, and an independent, statewide commission in California to support the reintroduction -- and eventual passage -- of a new special education funding formula. And, in California, the Consortium, working with a variety of other stakeholders, was able to influence a change in the state policy with respect to special education placement descriptions on the state data forms.

In Missouri, the State Board of Education adopted inclusion as one of three state board priorities for the year. The Board's subsequent "futures" document, *Meeting the Challenge,* specifically discussed students with disabilities. Like California, the state legislature enacted significant changes in the special education funding formula, in part, due to the consultation provided by the Consortium. Also due to the work of the Consortium and others, the response sheets for the state assessments were amended so that the IEP status of students could be noted on their response forms for accountability and data tracking purposes.

In New Mexico, the state's funding formula for both general and special education were revised. The Consortium worked with the State Department of

Education to add special education to that dialogue. In addition, through the work of higher education institutions, advocates, and the Consortium, the state passed new training requirements for administrators that included training in the I.E.P. process, American with Disabilities Act and reasonable accommodations, curriculum modification and student services. The Consortium provided information about "educational benefit" for students with significant disabilities to the state's Developmental Disability Planning Council (DDPC). The DDPC, using this information, then successfully lobbied to have the law removed from the New Mexico code that allowed districts to excuse from education any student for whom they could evidence no "educational benefit" from schooling.

As was noted above, the Consortium ***contributed to the revision and development of statewide infrastructures to support inclusion***. In New Mexico, the major teacher education institutions in the state started to work together to support the development of teachers and administrators for inclusive schools. In addition, a statewide technical assistance project on school restructuring began to include issues related to students with disabilities in their work with schools and districts. The New Mexico Department of Education developed an eight-point strategic plan for inclusion; the work of the Consortium was a key element of the plan. In Missouri, the Consortium developed the state's capacity to meet district needs for professional development on inclusive practices by creating in-service materials for the Department of Elementary and Secondary Education. These curriculum materials were used broadly by personnel involved in the state's CSPD center. Furthermore, in each state, the

Consortium conducted statewide staff development, mentored technical assistance personnel and district staff, directly provided professional development workshops and technical assistance to state and university personnel.

Importantly, each district in which the Consortium provided training and technical assistance subsequently ***included more students with disabilities, including those with significant needs, in the general education program***. For example, in Missouri all students with disabilities in Midway and Belle school districts were moved from self-contained to general education classrooms. In the Harrisonville School District, all elementary and middle school students with disabilities were incorporated into general education classrooms with support. The Independence School District integrated reading, Title 1, and inclusive practices at the elementary level which reduced by over 50% the number of referrals for speical education in grades K-2. In addition, changes in service delivery, policy, and classroom practice were documented through a portfolio-based evaluation system in each local district in which the Consortium worked. These portfolios were used by the partner Districts as source documents for decision making and planning.

State level data also indicate ***shifts in the placement patterns of students with disabilities*** during the tenure of the Consortium's involvement in each state. In California, there was a 47% decrease in the number of students served outside the general education classroom 21-60% of the time. Importantly, there was a substantial increase of 55.78% in the number of students who

received special services less than 21% of the time outside the general education classroom. We noted an increase in the number of students returning to regular education (21.48%), those graduating with certificates (19%), and a decrease in the number of students with disabilities dropping out (76.04%). In Missouri, we noted a 51% decrease in the number of students served in separate facilities and modest decreases in the numbers of students served outside the general education classroom 21-60% and more than 60% of the time. In this state, the number of students graduated with a diploma increased by 58% and those who dropped out decreased by 28%.

CONCLUSIONS AND RECOMMENDATIONS

Change takes time, and projects focused on changing policies and structures, as well as practices, are complicated. Considerable time and effort must be expended to learn the contexts within which change will occur, and to establish the relationships that will affect project activities. Moving too fast can create costly missteps which will require later "fix-up time." We believe there is a need for understanding at the project and federal levels that different contexts require substantially different technical assistance approaches. Individual projects and priorities may have a general model, but technical assistance providers have to be willing to abandon that model, if necessary, for an approach that is better suited to the local context and needs.

The Consortium identified a workable set of strategies for large-scale change (Salisbury, Strieker, Roach, & McGregor, 2001) to promote inclusive practices.

These strategies cluster into five areas: 1) developing inclusive philosophy, policies, structures and practices; 2) building capacity; 3) approaching change systemically; 4) linking change to policy; and 5) using general education as the context for change. Implementing these strategies took time. Projects designed to address complex policy implementation issues should be afforded sufficient time so that their contributions toward changes and shifts in systems can be adequately evaluated.

> **RECOMMENDATION**: OSEP should continue to fund five year, technical assistance projects

It is important to look systemically at inclusion. To a large extent, we know what to do at the individual student and classroom level to support inclusive practices. These strategies are delineated in the research synthesis completed by McGregor and Vogelsberg (1998). Less work has been done at the systemic level to support inclusive schooling practices. Yet, we feel, improvement in the services, supports, and outcomes for students with disabilities are dependent on altering the policies that drive both general and special education. Change must be explicitly linked to policy, and policies must be inclusive in their intent and implementation.

Providing technical assistance at the systems level requires focusing on large-scale strategies that have changed the way states, districts, and schools think about services, and the way they use resources. There is an interdependence among the various systems and parts of systems that provide services and supports to children and youth with and without disabilities. Change

in one area often affects what occurs in another. We reasoned that promoting coherence among structures, policies and practices would produce the most durable and widespread changes.

> **RECOMMENDATION:** OSEP should consider establishing priorities for funding to address:
>
> a) Issues related to systems change, particularly larger scale change, where the unit of analysis is greater than one school, and
> b) The links between policy and practice as they relate to the implementation of IDEA, school reforms, and inclusive educational practices.

Despite improvements, students with significant disabilities still experience barriers in their efforts to gain access to the general education curriculum with appropriate supports and accommodations. Our work shows that states and districts are still struggling to appropriately serve students with significant disabilities in inclusive environments. While some students with high incidence disabilities are returning to the general education classroom, in the districts in which we worked, the majority of students with significant disabilities were in separate schools and classrooms prior to our assistance. Indeed, that was the prevalent service delivery model in the states.

There are several aspects of state and district policy that support the segregation of students with significant disabilities. For example, when the Consortium began its work, the special education funding policies in each of the three states supported segregated services for students with significant disabilities. Personnel, assessment, and accountability policies were similarly fostering exclusion. While we made progress in the three states in which we

worked, the prevailing paradigm for students with significant disabilities across the country is segregated service. State and district data systems often do not consider full-time regular classroom placement for students with significant disabilities. State departments of education staff still want to create a continuum of *placements*, rather than a continuum of *services* for students with disabilities.

The issues and voices of these students and their families have become far less visible since the re-organization of OSEP. Critical IDEA implementation issues, such as access to the general curriculum and accountability for *all* students with disabilities, are complicated by the presence of students with significant disabilities in the general education setting. States and districts continue to struggle with these policy requirements. Importantly, outcomes for students with significant disabilities who are educated in inclusive settings have not been well documented. There are, therefore, numerous technical assistance, personnel development, research, and capacity building issues that warrant focused attention for this low incidence population.

> **RECOMMENDATION**: OSEP should increase attention to the educational needs of students with significant disabilities through the creation of initiatives, assignment of personnel to this area, development of interagency partnerships and funding, and the procurement of additional resources.

Embedded within each OSEP RFP are requirements to ensure accountability (e.g., advisory board or external reviews). We view this requirement as a drain on limited project resources and of questionable benefit to the implementation of the project. The reasons for this are three-fold. First, by successfully writing for a federal project of national significance, OSEP is already

acknowledging that the project is well-designed and that key personnel on the project have the knowledge and skills necessary for the work. Second, traditional advisory boards come together only sporadically, typically annually. As a result they often have limited exposure to the project's activities and their feedback about the workscope is based upon a limited sampling of interactions with project personnel.

Some projects, such as the OSEP-funded National Institute for Urban School Improvement, have developed new roles for the traditional advisory board that may prove a better model for OSEP to consider. In that project, the advisory board was constituted as a working leadership team with responsibilities for discussing responses to district issues and national trends, rather than providing feedback or guidance to the project on its operation.

Similarly, mid-project external evaluation does not always provide useful guidance. Like advisory boards, external review panels have a limited understanding of the full project. Planning for and conducting external review meetings is time consuming and expensive. The project can also be taken off track by review panel recommendations that miss the mark in terms of project goals and strategies. Project-specific evaluation using other institute directors (i.e., a peer-review model) may be more helpful.

> **RECOMMENDATION:** OSEP should consider developing RFPs that allow respondents greater flexibility in how program accountability will be ensured.

National projects need help and support to optimize their effectiveness and impact. We believe there is merit in bringing together project directors to

discuss how to run multi-site projects efficiently. Issues of coordination across sites, communication, human subjects assurances, and cross-site data consistency and interpretation are among the challenges we experienced. The Consortium's principal investigator informally sought out other directors of national projects to discuss these issues. However, these meetings were ad hoc and could occur only infrequently. OSEP is well-positioned to play a role in convening review/support meetings.

> **RECOMMENDATION:** OSEP should consider holding forums at its annual project director's meetings to focus specifically on implementation and evaluation issues affecting multi-year, multi-site projects.

Coordination with other national projects is difficult. Goal 7 of the Consortium was to "establish linkages and collaborative relationships among OSEP-sponsored research projects." In addition, Goal 3 of the cooperative agreement was to, "Provide training and technical assistance for the adoption, use, and maintenance of inclusive educational practices to interested projects funded under Statewide Systems Change and to other educational agencies interested in systems change activities." These two goals proved very difficult to address.

First, the relationship imposed upon the Consortium with respect to the Statewide Systems Change projects was not clearly defined to them, which caused some concern and initial resentment among those projects. Second, since the priorities of the Systems Change projects themselves changed over time, some of these projects were working from different priorities from each

other and the Consortium, which made coordination difficult. Furthermore, other OSEP-funded projects (e.g., research, model demo, personnel prep) were funded in different competition years and were on different timelines. These disjunctures also made coordination difficult. Finally, while the Consortium had as a specific goal to coordinate with other OSEP-funded projects, those projects had no mandate to coordinate with us. As a result, programs may not have had funding or time to coordinate with us, and truthfully, we had no way to compel them to work cooperatively with us. What we did find, with respect to the Statewide Systems Change projects, was that the more specific the task, the more beneficial the interaction among the projects. Therefore, the meeting with Statewide Systems Change projects that was specifically targeted toward lessons learned was probably our most successful interaction.

> **RECOMMENDATION:** To improve results, coordination among OSEP projects should be specifically structured and supported at the federal level, and not left to the projects to negotiate for themselves.

Project products need an institutional home after the project. Many OSEP-funded projects have as part of their scope of work a requirement to develop products for general dissemination. While these products have traditionally been in print form, increasingly they are in an electronic format and available on the World Wide Web during the term of the funded project. However, not all principal investigators have access to a publication and dissemination infrastructure that extends beyond the term of funding. Hence, products that are developed and posted on the Web by the project may not be accessible after the duration of the

project. Thus was the case with the Consortium. While the Consortium had its own web page while it was funded, access to the web page was eliminated a) because funding concluded and b) the PI transferred the project to another institution. Similarly, while the project funds supported the development and printing of the Consortium's products, there was no mechanism to reprint products, should there be a demand and there was no project web page after the duration of the project. While not all project products should be available indefinitely, there should be some mechanism to access the products after the official project funding period. The shelf life of each product must be determined.

> **RECOMMENDATION:** OSEP should consider in its review of proposals whether and for what period of time and in what forms projects should provide access to their products after termination of the project.

SUMMARY

The Consortium on Inclusive Schooling Practices was a multi-year project that had three broad objectives: (1) to establish a change process in multiple states focused on systemic reform; (2) to translate research and policy information into implementable educational practices; and (3) to build the capacity of state and local agencies to provide inclusive educational services. The Consortium carried out these objectives in a variety of ways, working with states, districts, higher education, families, teachers, policymakers, and other funded projects. The impact of the Consortium's work is documented in this report, as well as in the quarterly reports submitted to OSEP. The recommendations concluding this report are based on our experiences with this

project and other OSEP-funded activities. While we feel that we made significant strides in creating national awareness about inclusive educational policy and practice issues, and contributed substantively to changes in three states, we are cognizant that the students with significant disabilities are still largely treated as second-class students. There is a need to support more national efforts like the Consortium to demonstrate that inclusive policies, structures, and practices can, in fact, produce beneficial results for all students.

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